

# Iowa Individual Income Tax Short Form 2011 IA 1040A

For full-year Iowa residents only.

Fill in all information below.

## STEP 1: Fill in all spaces. You MUST fill in your Social Security Number.

|  |                                    |  |  |
|--|------------------------------------|--|--|
| Your last name   | Your first name/middle initial     | <input type="checkbox"/> Check this box if you or your spouse were 65 or older as of 12/31/11.   |  |
| Spouse's last name   | Spouse's first name/middle initial | Your Social Security Number  | Spouse Social Security Number                |
| Current mailing address (number and street, apartment, lot, or suite number) or PO Box |                                    | County No.   | Residence on 12/31/11<br>School District No. |
| City, State, ZIP   |                                    | <b>You must answer these questions</b><br>Dependent children for whom an exemption is claimed in Step 3<br>How many have health care coverage? _____<br>(including Medicaid or <i>hawk-i</i> )<br>How many do not have health care coverage? _____ |  |

## STEP 2: Filing Status: Mark one box only.

|   |  |
|---|--|
| 1 | Single: Were you claimed as a dependent on another person's Iowa return? <input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> |
| 2 | Married filing a joint return.   |
| 5 | Head of household with qualifying person. If qualifying person is not claimed as a dependent on this return, enter the person's name and                   |
| 6 | Qualifying widow(er) with dependent child. SSN here. Name: SSN:  |

### STEP 3

#### Exemption Credits

YOU  
(and spouse if  
filing jointly)

a. **Personal Credit:** Enter 1 (Enter 2 if filing joint or head of household.) ..... ☐ X \$ 40 = \$ .....  
b. Enter 1 for each person who is **65 or older** and/or 1 for each person who is **blind** .... ☐ X \$ 20 = \$ .....  
c. **Dependents:** Enter 1 for each dependent ..... ☐ X \$ 40 = \$ .....  
d. Enter first names of dependents here: ..... e. **TOTAL \$** .....

### STEP 4

#### Figure your income

1. Total wages, salaries, tips, and unemployment compensation. See instructions. .... 1. .... .00  
2. Taxable interest. If more than \$1,500, complete Schedule B. .... 2. .... .00  
3. Taxable dividends. If more than \$1,500, complete Schedule B. .... 3. .... .00  
4. Net income. Add lines 1, 2, and 3. .... 4. ☐ .... .00  
5. Federal income tax refund received in 2011. .... 5. ☐ .... .00  
6. TOTAL. Add lines 4 and 5. .... 6. .... .00  
7. Federal tax payment information. (a) Federal tax withheld ..... a. ☐ .... .00  
(b) Additional paid in 2011 for 2010 and any prior year. b. ☐ .... .00 7. .... .00  
8. Income subject to tax. Subtract line 7 from line 6. If greater than \$100,000 you must use IA 1040 long form... 8. .... .00

### STEP 5

#### Figure your tax, credits and checkoff contributions

9. Tax from tables. See IA 1040A tax tables at [www.iowa.gov/tax](http://www.iowa.gov/tax). .... 9. ☐ .... .00  
10. Total exemption credits from Step 3. .... 10. .... .00  
11. BALANCE. Subtract line 10 from line 9. If less than zero, enter zero. .... 11. ☐ .... .00  
12. Multiply line 11 by your school district surtax rate. See 2011 school district surtax list. .... 12. ☐ .... .00  
13. Fish and Wildlife Fund Contribution. \$1 or more supports the Wildlife Diversity Program. .... 13. ☐ .... .00  
14. State Fairgrounds Renovation Contribution. \$1 or more helps renovate the fairgrounds. .... 14. ☐ .... .00  
15. Volunteer Firefighters/Veterans Trust Fund. \$1 or more shared by two organizations. .... 15. ☐ .... .00  
16. Child Abuse Prevention. \$1 or more. .... 16. ☐ .... .00  
17. Total Tax and Contributions. Add lines 11 through 16. .... 17. .... .00  
18. Iowa income tax withheld from Box 17 of your W-2 form(s). .... 18. ☐ .... .00  
19. Iowa Earned Income Tax Credit. (federal EITC credit \$ ..... X .07) See instructions ..... 19. ☐ .... .00  
20. Total credits. Add lines 18 and 19. .... 20. .... .00

### STEP 6

#### Figure your refund or amount due

21. If line 20 is more than line 17, subtract line 17 from line 20. This is your REFUND. .... 21. ☐ .... .00  
eFile at [www.iowa.gov/tax](http://www.iowa.gov/tax) or mail to Iowa Income Tax Refund Processing, Hoover State Office Bldg, Des Moines IA 50319-0120  
22. If line 20 is less than line 17, subtract line 20 from line 17. This is the AMOUNT OF TAX YOU OWE. .... 22. ☐ .... .00  
23. Penalty. .... 23. ☐ .... .00  
24. Interest. .... 24. ☐ .... .00  
25. TOTAL AMOUNT DUE. Add lines 22, 23, and 24 and enter here. .... 25. ☐ .... .00

ePay at [www.iowa.gov/tax](http://www.iowa.gov/tax) or mail to Iowa Income Tax Processing, PO Box 9187, Des Moines IA 50306-9187. Write check to: Treasurer, State of Iowa

**POLITICAL CHECKOFF.** This checkoff does not increase the amount of tax you owe or decrease your refund.

☐ **SPOUSE** \$1.50 to Democratic Party ☐  
\$1.50 to Republican Party ☐  
\$1.50 to Campaign Fund ☐

☐ **YOU** \$1.50 to Democratic Party ☐  
\$1.50 to Republican Party ☐  
\$1.50 to Campaign Fund ☐

I (We), the undersigned, declare under penalty of perjury that I (we) have examined this return, including all accompanying schedules and statements, and, to the best of my (our) knowledge and belief, it is a true, correct, and complete return. Declaration of preparer (other than taxpayer) is based on all information of which the preparer has any knowledge.

|                    |      |                      |      |
|--------------------|------|----------------------|------|
| Your Signature     | Date | Preparer's Signature | Date |
| Spouse's Signature | Date | Address              |      |

Daytime Telephone Number  
• Verify your Social Security Number(s) • Recheck your math • Attach all W-2s.

Mailing Addresses: See lines 21 and 25 above. This return is due April 30, 2012.

41-080 (08/24/11)



# IA 1040A Schedule B

## Interest and Dividend Income

Name(s) as shown on page 1 of the IA 1040A

Social Security Number

**Note:** You must report all taxable interest and dividends on IA 1040A, even if you are not required to complete Schedule B.

### PART I:

### INTEREST

### INCOME

You must complete Part I if you received more than \$1,500 in interest in the tax year. Interest income which should be reported includes earnings from savings and loan associations, mutual savings banks, cooperative banks, credit unions, and bank deposits; State and municipal bonds, and interest from tax refunds. Do not report interest from federal securities.

**Interest Income.** List Names of All Payers.

| Name of Payer   | AMOUNT |
|---|--------|
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
| <b>Total Taxable Interest Income.</b> Add the amounts. Enter here and on IA 1040A, line 2. .... | .00    |

### PART II:

### DIVIDEND

### INCOME

You must complete Part II if you received more than \$1,500 in gross dividends in the tax year. Deduct that portion of any net dividend from mutual funds that is attributable to federal securities.

**Dividend Income.** List Names of All Payers.

| Name of Payer   | AMOUNT |
|---|--------|
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
|   | .00    |
| <b>Total Taxable Dividend Income.</b> Add the amounts. Enter here and on IA 1040A, line 3. .... | .00    |

